

2ND QUARTER MARKETING REPORT

Branson Convention & Visitors Bureau

August 25, 2015

- U.S. Economic Outlook
- U.S. Travel Performance
- Travel Industry Update
- Branson 2Q 2015
Performance
- Branson Visitor Update

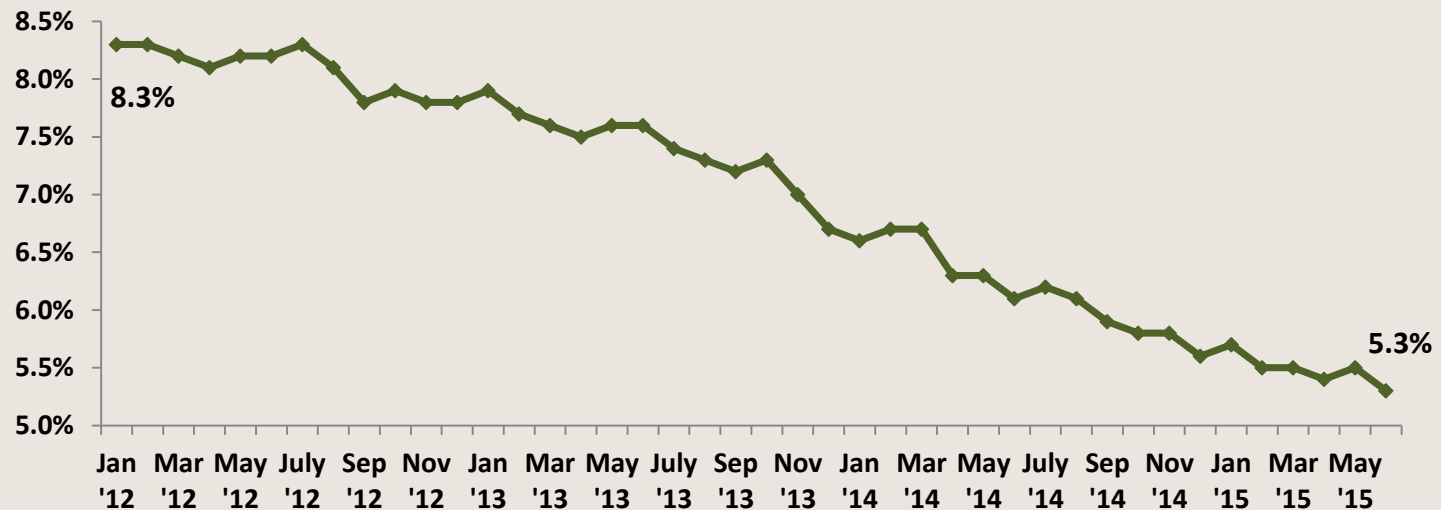
PRESENTATION OVERVIEW

ECONOMIC OUTLOOK

ALL INFORMATION REPORTED IS THE MOST RECENT AVAILABLE AS OF AUGUST 10, 2015

U.S. UNEMPLOYMENT

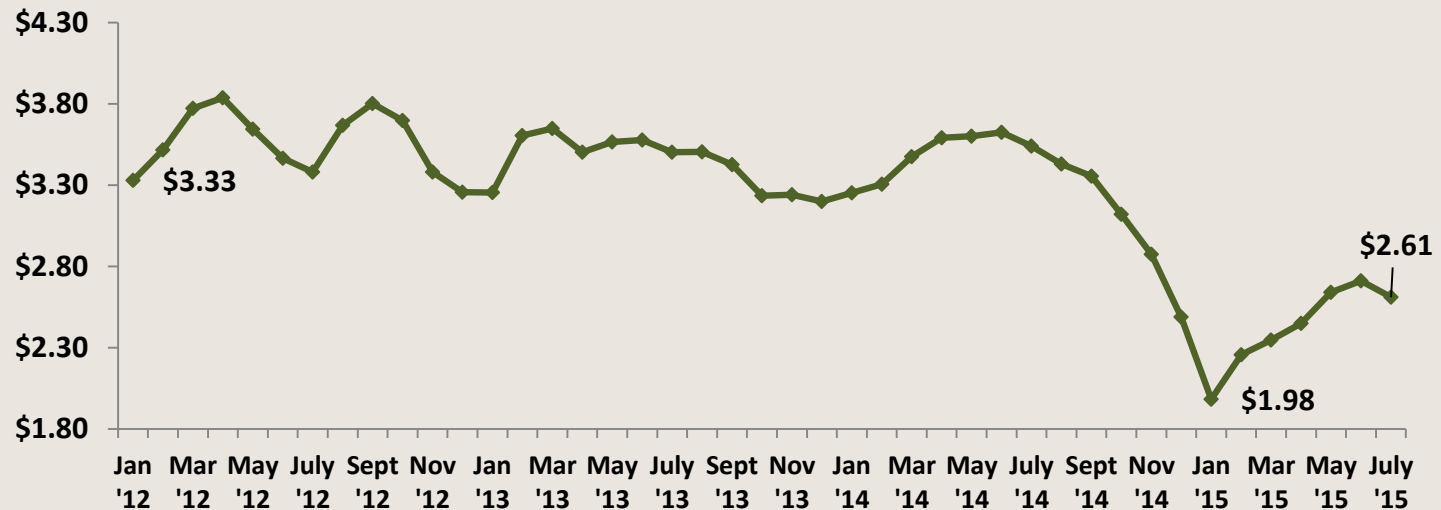
The U.S. Unemployment Rate has been trending downward since its peak in October 2009 when it reached 10.2%. At 5.3% in June 2015, it's at the lowest level since April 2008 when it was 5.0%.



This year alone, unemployment has dropped from 5.7% in January to 5.3% in June.

GASOLINE PRICES

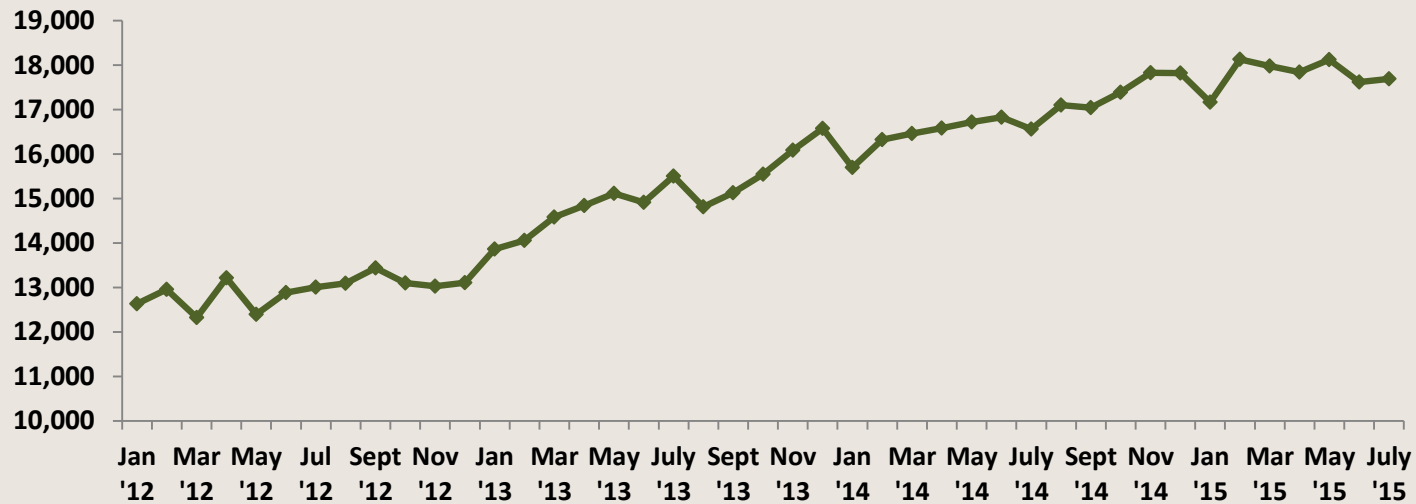
U.S. Gasoline Prices averaged \$2.61 at the end of July 2015. This is down 25% compared to the same time last year. Gasoline prices have risen \$0.63 this year increasing from \$1.98 in January to \$2.61 in July.



July gasoline prices have not been this low since July 2009 when they averaged \$2.46 just after the end of the Great Recession.

DOW JONES (DJIA)

The Dow Jones Industrial Averaged Closed at 17,690 in July 2015. This is up 6.8% compared to the same time last year. However, the DJIA has fallen 0.7% in 2015.



While the DJIA has experienced somewhat of a roller coaster ride in 2015, it has generally improved every year since 2008

TRAVEL PERFORMANCE

ALL INFORMATION REPORTED IS THE MOST RECENT AVAILABLE AS OF AUGUST 10, 2015



U.S. LEISURE & BUSINESS TRAVEL

According to the U.S. Travel Association, growth in leisure travel person-trips will slow in 2015 while business travel growth will pick up a little speed.

USTA estimates that leisure travel increased 2.7% in 2014 and growth will slow to +2.0% in 2015.

Additionally, business travel which grew by 1.3% in 2014 is expected to grow by 1.8% this year.

U.S. ROOM DEMAND +3.3%

According to STR, U.S. room demand has increased 3.3% over the last 12 months. As the USTA has predicted, this year's growth rate is slightly slower than the lodging industry was experiencing at this time last year:

- June 2015 +3.3%
- June 2014 +4.1%
- June 2013 +2.3%

SOURCE: STR, JUNE 2015

INDUSTRY UPDATE

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“MMGY FOUND THAT 28%
OF MILLENNIALS USED A
TRAVEL AGENT IN THE PAST
YEAR.”

In 2014, MMGY found that 28% of millennials surveyed used a travel agent in the past year. Travel Pulse states there are plenty of reasons to think that millennials will increase their use of travel agents; especially those aged 25 to 34.

Travel agents are gaining millennial trust by not offering boring ideas and giving unique perspectives on trusted travel destinations. While the trend for younger millennials is to forgo travel agents for the thrill of planning a trip on their own, there are signs they are seeking out agents for advice. For those overwhelmed with information, travel agents have a chance to filter big data with wisdom and experience. (Source: Travel Pulse, 7/21/15)

“UBER IS NOW MORE
POPULAR AMONG
BUSINESS TRAVELERS THAN
TAXIS.”

For first time in U.S., Uber is more popular among business travelers than taxis: Certify, an expense management company, recently reported that Uber accounted for 55% of ground transportation receipts in the three months prior to June compared with 43% for taxi services. In its hometown of San Francisco, Uber makes up 79% of business ground transportation expenses. (Source: Skift.com, 7/16/2015)

“THE DEFAULT TECH OF
GENERATION Z IS MOBILE
AND THEY VALUE
PERSONALIZATION.”

“The default tech of Generation Z is mobile and they value personalization, relevance, entrepreneurship and resourcefulness. Gen Zers prefer social networks such as Snapchat and Secret, as a quarter of this generation have left Facebook this year. They also self-educate, as more than 30% watch lessons online. This generation makes up more than 25% of the U.S. population, and by 2020 they will make up 40% of consumers.” (Source: CMO.com, 6/12/15).

BRANSON 2Q PERFORMANCE

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BRANSON ESTIMATED VISITATION

2nd Quarter 2015



CITY OF BRANSON SALES TAX

2nd Quarter 2015



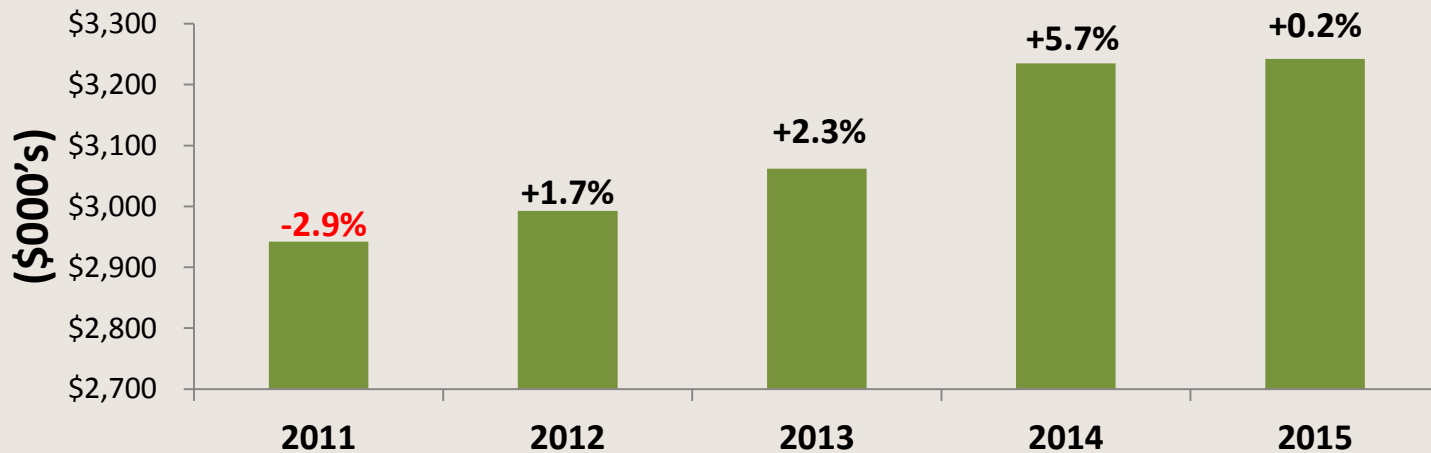
CITY OF BRANSON TOURISM TAX

2nd Quarter 2015



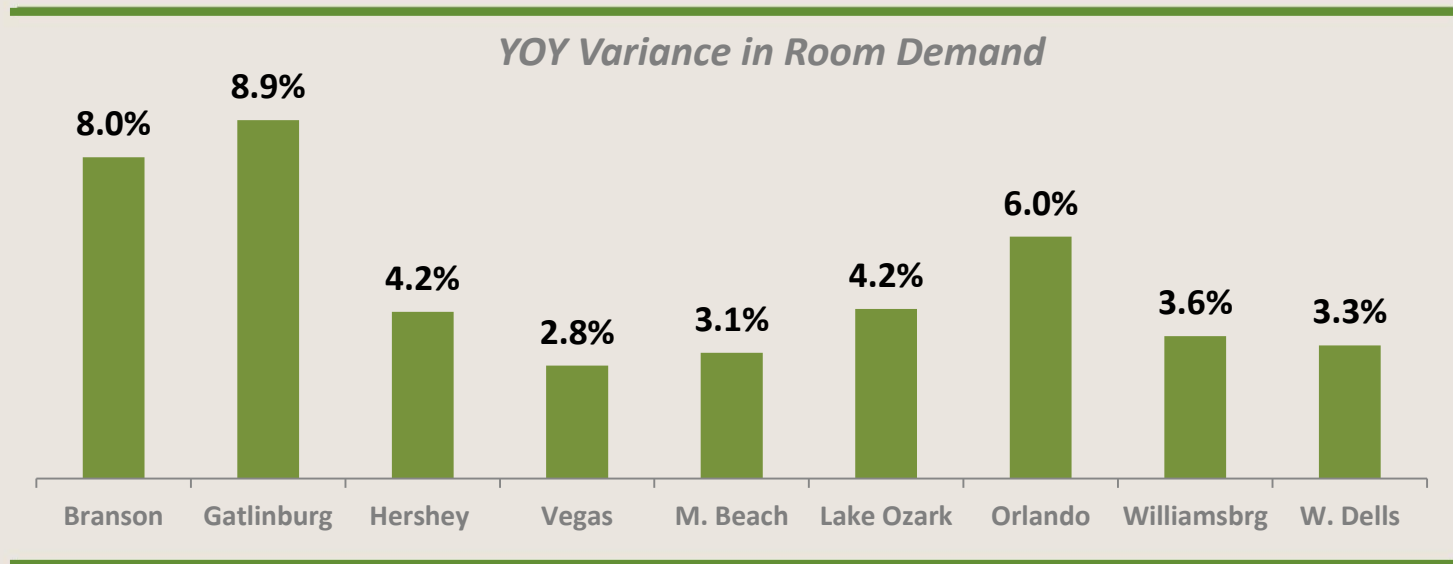
TCED TOURISM TAX

2nd Quarter 2015



ROOM DEMAND COMPARISON

2nd Quarter 2015



BRANSON VISITOR UPDATE

ALL INFORMATION REPORTED IS THE MOST RECENT REPORTED AS OF AUGUST 10, 2015

YOY VISITOR TRENDS

METRIC	2015	2014	VAR
SPENDING	\$770	\$831	-\$61
FIRST-TIMERS	22.8%	22.3%	+0.6%
% FAMILIES	37.6%	35.9%	+1.7%
AVG ADULT AGE	57.7 yrs	58.3 yrs	-0.7 yrs
LOS	3.7 nts	4.0 nts	-0.3 nts
% SEEING SHOWS	68.3%	77.5%	-9.2%
AVG # SHOWS SEEN	3.1	3.2	-0.1

SOURCE: H2R MARKET RESEARCH, MAY 31, 2015. n = 641

VISITATION BY MARKET

METRIC	% VISITORS	VAR TO 2014
CORE MARKET	12%	+ 7%
PRIMARY MARKETS	34%	+14%
OUTER MARKETS	23%	+21%
NATIONAL MARKETS	31%	- 7%
TOTAL	100%	+7.1%

SOURCE: H2R MARKET RESEARCH, MAY 31, 2015

MOST INFLUENTIAL SOURCES

18%

Searched online
for specific
business.

23%

Looked up
Branson on my
computer at
home.

23%

Discussed Branson
with a friend



DEPARTMENT UPDATES

SPORTS MARKETING AND DEVELOPMENT

- Second Annual Bass Pro Legends of Golf tournament
- HoopPlay USA hosted new basketball tournaments at the Branson Rec Plex in April and May.
- CESM returned to host the DIVAS Half-Marathon & 5K – Midwest for the second year in Branson.
 - 1523 participants
 - 1,078 participants traveled from beyond a 60-mile radius
 - Contributed approximately \$1,069,855.08 in direct economic impact



Lead Summary	2 nd Quarter		
	SA	RFPs	Total
SPORTS	94	18	112

LEISURE GROUP SALES

- RFPs up 114% year to date
- RFIs up 95% year to date.
- Hosted 7th Annual Professional Travel Planner FAM April 14 – 17:
 - 65% had never traveled to Branson before this FAM
 - 100% rated FAM very organized, professional and would recommend to colleagues
 - 71% will book group business to Branson in 2015 due to attendance at FAM
 - 85% will book group business to Branson in 2016 due to attendance at FAM
- Produced new 2016 student sales guide, will debut at the SYTA Conference in Branson given to SYTA Tour operators.

MEETINGS & CONVENTIONS

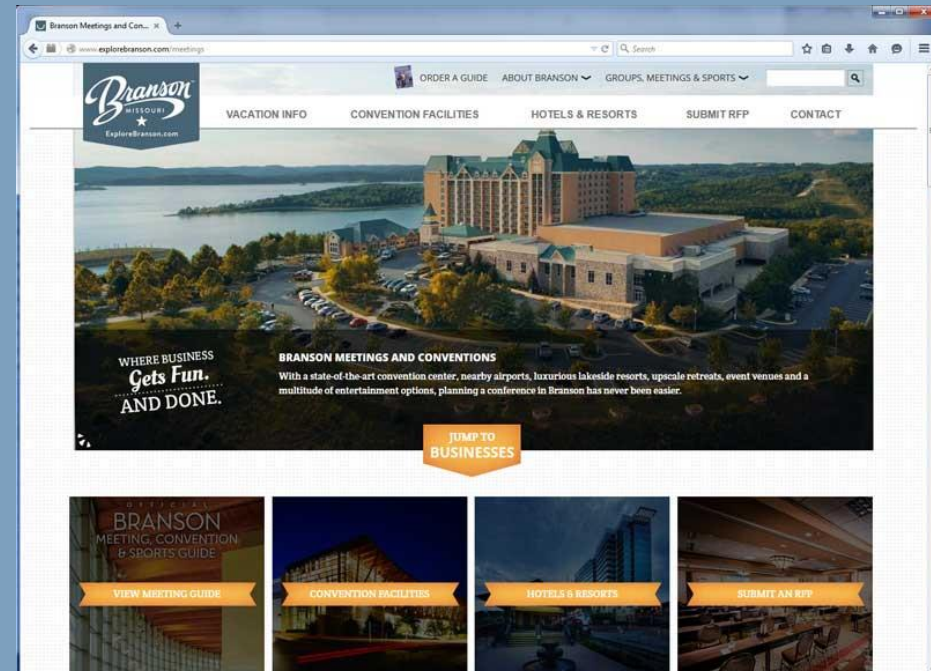
- Distributed 41 meeting RFPs into the community – 15 groups booked definite
- Hosted or assisted with 14 meeting planner site inspections
- Hosted Meetings, Conventions & Sports 101 event for industry
- Conducted research through the International Association of Administrative Professionals to identify new customers planning meetings in our region.
- Launched meeting planner blog program and new virtual site inspections on explorebransonmeetings.com

COMMUNICATIONS/PUBLIC RELATIONS

- April FAM Tours with Buffalo (golf writers) and Geiger (travel writers) produced articles in *USA Today*, *Atlanta Journal-Constitution*, *The Oklahoman*, *Arkansas Democrat-Gazette* and numerous other publications.
- Society of American Travel Writers (Western Chapter) held annual conference in May with 65 attendees. It was the first time in Branson for most of them.
- The Weather Channel's AMHQ, with Sam Champion and Jim Cantore, broadcast live from Branson Landing on June 12 with an ad equivalency of \$600,000.
- Branson will host 40th annual Mid-America Emmy Awards in Oct. 2016.
- At the end of 2Q ad equivalency values were up 24% over 2014

WEBSITE AND INTERNET MARKETING

- Meetings and Sports microsites launched in May
 - Previously separate sites:
- Relaunched the “This Week in Branson” hot sheet that is used by many front-desk people in town
- Added dozens of articles and videos created by vendor Miles and in-house by CVB staff.
- By the end of the 2nd Quarter, there were more than 125 articles and videos in the “Trip Ideas” section of ExploreBranson.com



SOCIAL MEDIA & CONTENT

- Launched user-generated photo contest summer social campaign
- Received 482,866 impressions during the #BransonSummer Twitter Party
- Shot four videos as a part of content plan:
 - Outdoors
 - Thrill-seekers
 - Branson's Entertainment District
 - Girls Getaway



Questions?

THANK
YOU